

Westmark School

THE DIFFERENCE IS BRILLIANT

PLANNED GIVING

We are honored that you feel inspired to support Westmark School, a creative and supportive college preparatory school dedicated to educating, empowering and celebrating students with distinct learning styles, providing the tools necessary to achieve successful and fulfilling futures. To ensure the best possible stewardship of your generously planned gift to Westmark School, we ask that you complete the form below to inform us of your recognition wishes (please check all that apply).

Name: _____

Address: _____

City / State / Zip Code: _____

Home phone: () _____ - _____ Cell phone: () _____ - _____

Email: _____

.....

I / We have included Westmark School in my / our:

- Will or living trust
- Retirement account
- Life insurance policy
- Charitable remainder trust, gift annuity or other income-producing gift plan
- I / We have made other estate provisions naming Westmark School as beneficiary.

The approximate value of my / our future gift is \$_____._____ if it were to be realized today.

.....

- Please publish my / our name among your list of Westmark School donors

I / We wish my / our names(s) to appear as follows (*e.g. Jane and John D. Smith*):

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- Do not publish my / our name on the Westmark Fund donor listing. I / We prefer to remain anonymous. (Note: Westmark School listings will never reference your planned gift amount. We understand that this amount can change over time, or may be revoked)

Please share with us why you decided to make Westmark School part of your legacy:

—

For any assistance: Bria Verdugo-Uy, Assistant Director of Annual Giving at
(818) 986-5045 or bverdugo-uy@westmarkschool.org

Westmark School (Learning With A Difference, Inc.) is a non-profit organization
Section 50(c)(3) of the Internal Revenue Code - Federal Tax ID #95-4616645
5461 Louise Avenue, Encino CA 91316 • (818) 986-5045 • www.westmarkschool.org

WAYS TO GIVE

You can name Westmark School in your long-range plans including:

- Your will or trust with wording such as: "I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, the sum of \$_____.____; or _____% of the residue of my estate."
- IRA or retirement plan beneficiary
- Life insurance beneficiary
- Financial account
- Charitable IRA Distribution: If you are age 70 1/2 or older you may be eligible to transfer up to \$100,000 in gifts directly from your IRA to Westmark School and exclude the amount of your gift from taxable income.

*If you have questions or would like to discuss the benefits of IRA charitable distributions, please contact **Bria Verdugo-Uy, Assistant Director of Annual Giving** for Westmark School at (818) 986-5045 and your tax advisor.*

View [Sample Letter from IRA Account Owner to IRA Administrator.](#)

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SUGGESTIONS FOR BEQUEST VERBIAGE

You may include a bequest to support Westmark School when preparing your will or living trust, or by adding a codicil to your present will or living trust. Bequests may be of cash, securities, bonds, real estate, copyrights, royalties or other property. Bequests of all sizes are welcome, whether they are outright, residual or contingent.

The following information is not intended to be legal or tax advice. We recommend that you consult with a qualified estate planning attorney when drafting your will or living trust. These are suggestions only to be of assistance to you or your attorney when filling out the Westmark Fund form:

SPECIFIC BEQUEST:

"I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, the sum of \$_____.____; or _____% of my estate for general support purposes."

RESIDUAL BEQUEST:

"I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID # 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, ____% of the residue of my estate for general support purposes."

CONTINGENT BEQUEST:

"In the event that _____ predeceases me, I hereby give to Westmark School (aka Learning With A Difference, Inc.), a not-for-profit organization (Federal Tax ID# 95-4616645) with the location at 5461 Louise Avenue, Encino, CA 91316, _____% of the residue of my estate for general support purposes."

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SAMPLE LETTER

Sample letter from IRA account owner to IRA administrator requesting a Charitable Distribution be made from an Individual Retirement Account:

(Date)

(IRA Administrator Name)

(Street Address)

(City, State and Zip Code)

RE: Request for Charitable Distribution from Individual Retirement Account (IRA)

Dear (IRA Administrator Name),

I am requesting a direct charitable distribution from my Individual Retirement Account # _____ as provided by The Protecting Americans from Tax Hikes Act of 2015 and Sec. 408(d)(8) of the Internal Revenue Code of 1986, as amended.

Please issue a check in the amount of \$_____._____ payable to Westmark School and mail to the following address:

Westmark School
Attn: Advancement
5461 Louise Avenue
Encino, CA 91316

Send the check directly to Westmark School at the above address. Please include my name on the check or with accompanying correspondence, and send me a copy of the transfer for my records. Questions for Westmark School should be directed to **Bria Verdugo-Uy, Assistant Director of Annual Giving** at 818-986-5045. The Federal Tax ID number of Westmark School (aka Learning With A Difference, Inc.) is 95-4616645.

You may contact me at () _____ - _____ if you have any questions. Thank you for your assistance.

(Your Signature)

(Your Printed Name)

(Your Street Address)

(Your City, State and Zip Code)